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ABSTRACT

This publication reports the development of the vocational-technical resource consortia in Ohio and identifies the operational procedures associated with successful programs. Five exemplary consortia were studied in some depth; however, data were obtained from all of the 23 consortia in the state. The research indicates that the consortium is an excellent method for coordinating local and state vocational education resources with community organizations, such as the Chamber of Commerce and state agencies including the Ohio Department of Development. This coordination assists new and expanding business and industry in solving their training problems. Operational procedures have been recommended concerning organization and administration; marketing and communication strategies; and proposal development training, approval, and management. (KC)

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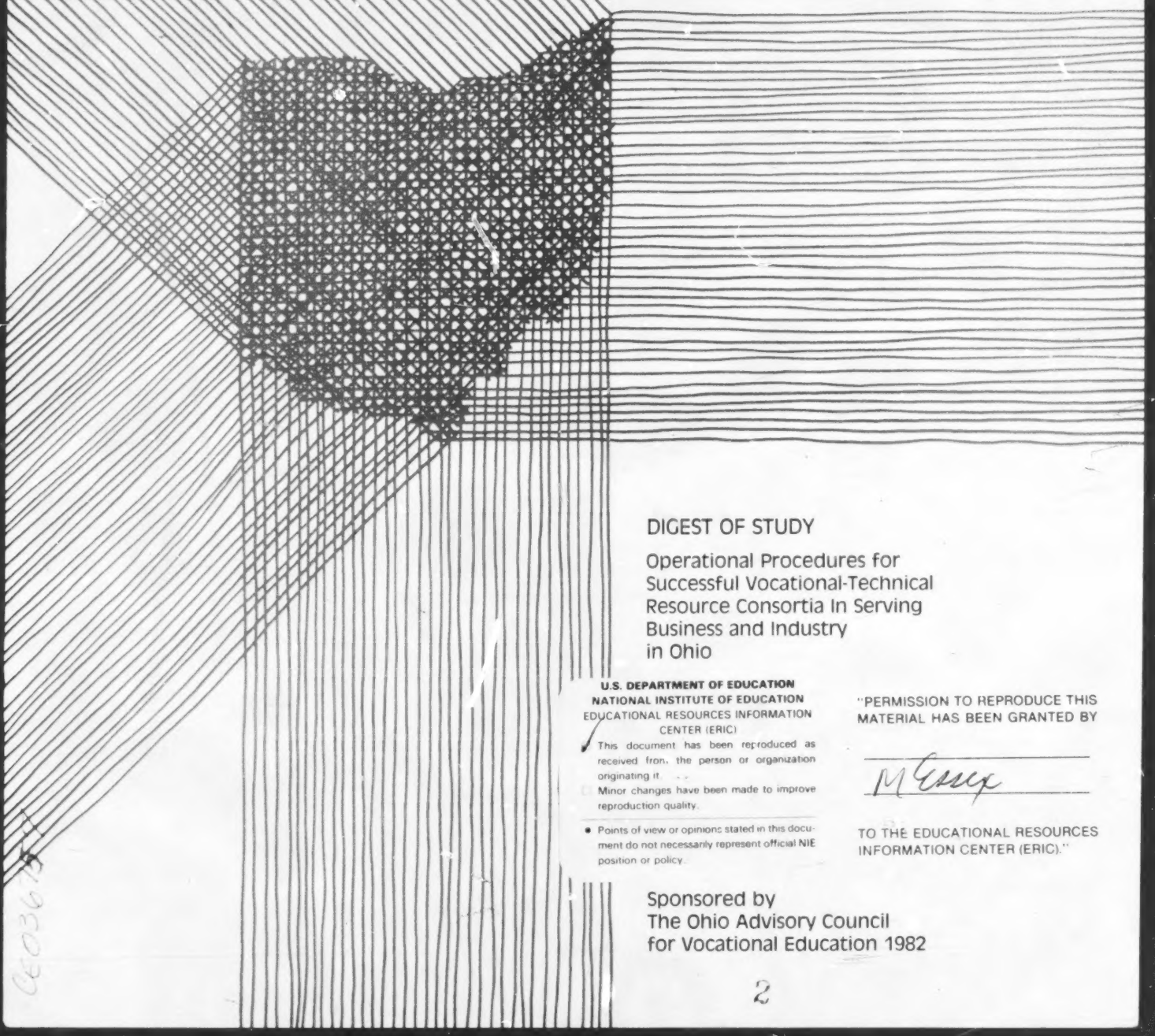
The Vocational-Technical Resource Consortia Serving Business And Industry In Ohio



DIGEST OF STUDY

Operational Procedures for Successful Vocational-Technical Resource Consortia In Serving Business and Industry in Ohio

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Foreword

Cooperation and coordination are difficult to attain in our rapidly changing technological and internationally dependent economy. Preparing the essential human resources of suitable quality is continuously challenging. The Consortia concept, as developed in Ohio for the purpose of coordinating available resources to provide employee training needs, may be an answer for our time.

This publication is a digest of a research study, "Operational Procedures for Successful Vocational-Technical Resource Consortia in Serving Business and Industry in Ohio", conducted by James E. Frasier and Dr. William Stanton, University of Cincinnati. Mr. Frasier, currently Vocational Director for the Dayton City Schools, was associated in developing the Consortium in the Dayton area.

Emphasis has been directed to reporting the development of the Consortia in Ohio and identifying the operational procedures associated with successful programs. Five exemplary Consortia were studied in some depth; however, data were obtained from all of the 23 Consortia in the state.

The research indicates that the Consortium is an excellent method for coordinating the local and state vocational education resources with community organizations such as the Chamber of Commerce and state agencies, including the Ohio Department of Development, in assisting new and expanding business and industry in solving their training problems. Operational procedures have been recommended concerning organization and administration, marketing and communication strategies, and training proposal development, approval and management.

The information should be useful to Vocational-Technical Education in maximizing opportunities for employment and contributing to the productivity of business and industry in revitalizing our economy.

E. W. Kavanagh
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Nature of the Study

During the late 1970s top administrators in Ohio's Department of Development (ODOD)* and the Department of Education's Division of Vocational Education (DVE), with continuing support from the Governor's office, became closely aligned in the state's economic development efforts to create new jobs and preserving existing jobs. The need for a more organized pattern of involving local vocational-technical education institutions in such a development was recognized, resulting in Ohio's program of local or regional Vocational-Technical Resource Consortia.

The system of twenty-three local Consortia, or groupings, of vocational-technical education institutions was developed for the primary purpose of coordinating available training resources in meeting employee training needs of new or expanding industries. This was part of a comprehensive incentive package to encourage companies to expand or locate in Ohio. The loss of thousands of manufacturing jobs in Ohio to the so-called "sun belt" states was considered as a very serious long-term problem.

Purpose of the Study

The major purpose of this study is to examine the development, organization and operation of the Vocational-Technical Resource Consortia program in Ohio in order to identify those elements, policies, and procedures that appear to contribute to their effective operation and future growth.

The examination of the Consortia included a review of the following:

- Vocational education's role in state and national economic development activities.
- Consortia history and development.
- Organizational elements of the Consortia.
- Operational policies.
- Marketing or communications techniques.

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*Formerly known as Ohio Department of Economic and Community Development

- Training and development activities.
- Project approval and implementation.
- How the future of the Consortia is viewed.

Research Techniques

A variety of techniques was used to gather data about individual Consortia as well as general information relating to the total concept.

1. General Questionnaire

A general questionnaire consisting of 39 items was distributed in December 1981. Each Consortium Director was provided with a supply of questionnaires to distribute to persons representing the various institutions and organizations that were members of their particular Consortium. Individuals completing questionnaires returned them directly to the researcher. A total of 404 questionnaires were distributed. Two hundred eighty-four (284) of the questionnaires (70.1%) were returned. Individual questionnaires representing twenty-two of twenty-three Consortia are included in the returns. All twenty-three Consortium Directors and 261 members returned the questionnaires.

The following items were reviewed with respect to each of the 23 Consortia: membership representation; number of training programs implemented; training proposals pending; evidence of communications activities/techniques; constitution and by-laws; meeting minutes; Director's starting date; Chamber of Commerce involvement; and other related accomplishments.

2. Case Studies

To give this study additional depth and balance, five Consortia were selected as case study sites. The selection process was accomplished by a panel comprised of persons knowledgeable about Consortia activities in Ohio: a representative of the Ohio Department of Development; the DVE assistant director for construction and post-secondary education; the DVE supervisor of adult education; a state representative of the Bureau of Apprenticeship and Training; and the state Director of Educational Communication for Business/Industry.

The five selected Consortia were visited by the researcher. Individual interviews were conducted with the Consortium Director and a person or persons representing: a Chamber of Commerce; a Private Industry Council or CETA prime sponsor; a secondary and a post-secondary institution; and a representative of an industry presently being served by an approved Consortium project.

General characteristics of the case study sites:

- All were multi-county Consortia (from 3 to 7½ counties).
- All had active approved projects under way and pending.
- Four of five had active Chamber of Commerce involvement.
- Two included major urban areas in addition to rural areas.
- Three were primarily rural Consortia with small to moderate size communities located within their service areas.
- All five Consortium Directors had fundamentally different work experience histories.
- All five Consortia had active Boards representing a variety of regional and community organizations.

3. Information from State Leaders

To round out the data base and to gather additional background information, interviews were held with the following:

Dr. Byrl Shoemaker, Executive Director, Division of Vocational Education and Career Education, Ohio Department of Education

Dr. Charles B. Dygert, Ohio Director of Communication for Domestic and Foreign Business and Industry, Division of Vocational Education, Ohio Department of Education

Michael Hobson, Deputy Director for Administration, Ohio Department of Development

4. Review of the Literature

References to other research, articles, documents, and presentations that relate to the topic or area under discussion were noted in this study.

Vocational Education's Role in Economic Development Efforts

The involvement of vocational education in economic development is not a new concept. For more than twenty years a number of states have been actively involved in efforts to stimulate industrial growth through employee training as part of a package to attract business to their area.

According to a report published in Industrial Development (Jan/Feb 1980) all fifty states provide assistance in securing employees for new industries. Many states combine the resources of their vocational-technical systems and state agencies for economic development.

Organization Patterns

While all states may offer training assistance as part of their inducement plan to business and industry, only a minority have what can be termed a well developed program. The American Vocational Association (AVA) (Gene Bottoms, 1980) reports "fourteen states have had coordinated economic development activities with vocational education, using state dollars, for at least five years. Seventeen states have begun coordination/liaison efforts and have been operational for at least one year but less than five. The remaining nineteen states show no continuity of effort."

In a project titled Vocational Education: A Look Into The Future, the authors (Ruff, Shylo, Russell, 1981) project that one of the specific features of vocational education in their standard world scenario will be:

> Vocational education will assume more responsibility as an actor in economic development and will become increasingly involved in retraining workers, in insuring an adequately trained work force, and in meeting labor demands of new businesses and industries. (p. x)

Across the nation many vocational educators are putting economic development strategies in place and others are examining existing patterns

for components they can replicate. There is no doubt that our economy is experiencing a rapid transition to a much more sophisticated technological era. In areas where vocational education is linked closely with the various components of this change, the resulting upheaval should be minimized.

Fourteen State Survey

A recent survey of New and Expanding Industry Training Programs in fourteen states, conducted by John Lloyd, Kentucky Director of Interagency Relations for the Bureau of Vocational Education, identified the patterns and levels of activity shown in Table 1 (data FY-81).

TABLE 1

NEW AND EXPANDING INDUSTRY TRAINING PROGRAMS

State	No. of Staff	Budget In Millions	No. of Indus. Served	No. of Prog. Oper.	No. of People Served
AL	25	$1.30	82	82	3,200
FL	3	1.00	73	--	3,000
GA	4*	2.00	68	68	6,200
IL	2	.75	26	26	1,135
KY	17 P-T	.35	39	49	3,093
LA	3	1.00	40	48	3,093
MI	14	1.13	75**	199**	6,823**
MO	varies	.20	6	21	950
NC	9	2.00	75	80	7,000
OH	26	5.00	75	110	48,000 (upgrade)
OK	7	---	24	26	1,920
SC	5	.64	77	77	3,793
TN	18	1.20	254	240	12,932
WV	1***	.16	45	34	886

*Plus 28 field consultants

**Many programs also conducted with voc. ed. funds for existing businesses.

***38 part time

Highlights From Other States

August Bolino (1981, p. 18) proposes that "Vocational education can play a role in attracting new business to a region, in assisting businesses to expand or to survive, in promoting the growth of locally owned businesses, and in creating public sector jobs." A number of states have had such accomplishments.

South Carolina: Since 1960 over sixty European companies have established operations in the state (Taylor, 1980, p. 4). More than $10 billion in new capital investment has been attracted to the state (Morris, 1979, p. 49). A system of sixteen Technical Education Centers (TECs) and fifty-five vocational centers provide training to business and industry. A system of Special Schools for Industrial Training, with a separate line-item legislative appropriation, provides most of the pre-employment training for new and expanded industries. Fourteen in-field industrial consultants work with the training programs and maintain contact with businesses. The TEC system is presently developing a program in high-tech areas called "Design for the Eighties" (Dudley, 1982). Six resource centers are planned, each to specialize in one aspect of high technology.

Oklahoma: The vocational education system through its Special Schools Division, works with new industries in the state (Paulsen, 1981, p. 15). The state Department of Vocational and Technical Education also maintains two industrial coordinators in the Department of Economic Development for liaison purposes (AVA, 1981). A state equipment pool is maintained for on-site training purposes. A team of professionals in the Special Schools Division perform employer training needs assessment, training program development and coordinate delivery of training. Two hundred seventy industries locating new plants in the state have been served (AVA, 1981).

Mississippi: The "Industry Services Program" began in 1973 in the State Division of Vocational and Technical Education (Tuttle and Wall, 1979, p. 7) and served over 60 firms between 1973 and 1979. Local industry services program coordinators work with companies to develop specific programs. Close coordination of economic development efforts is made through the state division of Vocational-Technical centers and junior colleges. Between 1975-1980 a total of 18,928 trainees completed industrial start-up training programs in Mississippi (AVA, 1981).

Florida: The Division of Vocational Education works closely with the Division of Economic Development, Florida Department of Commerce. The Vocational Education Division's Industry Services Training Program, begun in 1978, works with local education agencies to set up specialized programs. By the fall of 1980, 17 projects involving 2,000 workers had been completed, 25 more were under way for 1,100 new workers, and 26 projects were under negotiation with a potential of 11,300 jobs. A Leadership Development Program is also available (Florida Department of Education, 1980).

Georgia: Georgia's "Quick-Start" program was launched in 1966 to serve the employment and training needs of new and expanding industry. It is operated by Georgia's Department of Community Development in cooperation with the Industrial Services Unit of the State Department of Education. Pre-employment and on-job-training are emphasized. Costs are shared by the state and by the in-coming firm (Bushnell, 1980).

Some Guidelines

In a National Center for Research in Vocational Education publication titled Sharing Resources: Postsecondary Education and Industry Cooperation (Warmbrod et al, 1981), the authors identified and summarized a set of eleven guidelines for working collaboratively with industry:

1. There must be good, clear communication between key persons in industry and education.
2. Excellence in teaching is essential.
3. There must be institutional flexibility in meeting the needs of industry.
4. Programs offered must be of high quality.
5. Good, active advisory committees are important.
6. Education should have a quick response time.
7. There must be recognition of mutual need.
8. The support of administrators and faculty within the college is required to successfully serve industry.
9. Careful and thorough planning in each project is essential.
10. A clearly written agreement or contract helps achieve successful completion of joint endeavors.
11. There should be continued evaluation of the program to up-date and improve it.

Consortia History and Development in Ohio

The Governor's office and the Ohio Department of Development (ODOD) were actively involved during the 70's in aggressively soliciting companies to locate in Ohio. In 1979, both ODOD and the Division of Vocational Education (DVE) identified a staff person to be responsible for the coordination of training program development between their respective agencies for economic development purposes. Dr. Charles B. Dygert was selected by DVE as Director of Educational Communications for Domestic and Foreign Business and Industry.. Dr. Dygert was to work cooperatively with Mr. Michael Hobson, ODOD's Deputy Director for Administration.

The ODOD involvement has provided the need entré to business/industry top executives through contacts generated by the Governor's office and ODOD--contacts generally out of the reach of most vocational education personnel working with local business/industry groups. This top-down thrust by ODOD and the Governor has been invaluable to the development of the total Consortium process.

Working with local vocational educators, the DVE Communications Director devised a network of twenty-three local groups comprised of secondary school Vocational Education Planning Districts (VEPDs) and two-year technical and community colleges. The overall purpose of these groups was to serve as a local clearing house for economic development projects generated primarily through the ODOD. Ultimately these groups became organized as Consortia of local vocational-technical training institutions.

Local Chambers of Commerce were brought into the Consortia process from the beginning because of their active role in local economic development efforts. Chambers now play an active role in twenty-two of the twenty-three Consortia.

Both ODOD and DVE have provided funding coordination for the individual and state-wide Consortia process with active support from the Governor's office. In 1981 the State Legislature provided line-item budgetary support earmarked for training projects with new and expanding industries as coordinated and developed through the Consortia.

Purpose and Objectives of the Consortium

As the twenty-three Consortia became formally organized, each adopted a Constitution and By-Laws. The purpose of the Consortium and its objectives are frequently stated in the following pattern: (Toledo-Northwest Ohio Consortium Constitution).

> The purpose of the Consortium shall be to encourage the cooperation of business, industry and education for the economic stability and growth of the Northwest Ohio Area.
>
> The objectives of the Consortium shall be:
>
> - To provide specific training opportunities for: new business and industry; expanding business and industry; existing business and industry.
> - To assist in locating trained personnel.
> - To work in a flexible manner to serve the educational and training needs of business and industry.

In a very brief period of time beginning in mid 1979, the DVE and ODOD agreed in principle to the development of the Consortia, secured funding for a leadership position in each group, organized the state into twenty-three Consortium districts, and began to develop and fund projects cooperatively in the various areas.

Membership

The membership of the Consortia at the time of this study is reported in Table 2.

TABLE 2

Frequency of Consortia Membership of Selected Institutions, Agencies, and Groups

Group	Case Study Sites (N=5)		Balance of Consortia (N=18)		Total (N=23)	
	N	%	N	%	N	%
Joint Vocational School	5	100	18	100.0	23	100.0
Chamber of Commerce	4	80	18	100.0	22	95.6
Indiv. School District	4	80	16	88.9	20	87.0
Technical College	3	60	13	72.2	16	69.6
University Branch Campus	4	80	9	50.0	13	56.5
Economic Dev. Group	2	40	6	33.3	8	34.8
Ohio Bur. Empl. Services	2	40	5	27.8	7	30.4
Community College	0	--	7	38.9	7	30.4
CETA Prime Sponsor	2	40	5	27.8	7	30.4
Business/Industry	3	60	3	16.7	6	26.1
Private Industry Council	0	--	6	33.3	6	26.1
4-year College or Univ.	2	40	3	16.7	5	21.7
Public Utility	4	80	1	5.6	5	21.7
Local Government	1	20	3	16.7	4	17.4
Vocational Compact	1	20	1	5.6	2	8.7
Professional Association	1	20	0	--	1	4.4
Agric. Research & Develop.	0	--	1	5.6	1	4.4
Labor Organization	0	--	1	5.6	1	4.4
OTTO*	--	--	--	--	--	--

*Ohio Technology Transfer Organization (OTTO) representatives are shown as not holding membership in any Consortium. However, approximately 43% of the Consortium Directors indicated that an OTTO representative attends their monthly meeting.

Financial Considerations

Funding of Consortia operations was a paramount question from the initiation of the concept. It became apparent in the early developmental stages of the program that at least one full-time staff person would be required to handle the various aspects if they were to become viable organizations. Recognizing this need, Ohio's Executive Director of Vocational Education, Dr. Byrl Shoemaker, created the position of Vocational Consortium Supervisor to be funded by the state at $7,500 (later increased to $8,000). Seed money for the development of local Consortia was thus made available.

The task of providing additional funds for operational purposes was left to the local Consortium. Some Consortia were successful in obtaining funds from a CETA prime sponsor. During 1980 the SDE and ODOD worked cooperatively to seek additional funding sources to support a director for each of the 23 Consortia. The Ohio Department of Administrative Services - Special Grants Office for 1% Linkage Programs approved their request as of October 1, 1980. By combining SDE and 1% Linkage Program funds, a total of over $29,000 was made available to each Consortium for the fiscal year October 1, 1980 through September 30, 1981.

The first funded project was with the Miami Valley Consortium for a training program with the Chevrolet Division of the General Motors Corporation. A full-time on-site training coordinator was hired in March, 1980 to work with GM staff in the coordination of state and local training resources. In the initial phase of the project over 3,000 employees took 40-80 hours of training (in training centers established in each plant) as preparation for assignment to either the truck assembly division or the diesel engine plant (Automotive News, 1981).

Present and future funding patterns are viewed as a serious concern facing the Consortia in attempting to meet their established goals. In the case study sites, 52.4% persons responding to the Questionnaire felt that their Consortium was adequately funded. The balance of Consortia respondents indicated a 40% agreement, while the majority of Consortia Directors (63.6%) did not feel that adequate funding was available.

Operational Policies

The Constitution and By-Laws of the twenty-three Consortia establish the official membership for the organization. Generally, each member organization is represented on the Board of the Consortium with one vote. The Board selects one person from its members to serve as Chairperson. Frequently the duties of corresponding secretary are delegated to the Consortium Director. The Consortium Director (CD) is responsible to the Executive Board, is selected by them, and serves at their direction.

Regular day-to-day activities may be supervised by the agency that houses the Director. Payroll matters, daily attendance and travel reports, for example, are generally coordinated through this agency, which may or may not be the official fiscal agent for the Consortium.

The Consortium Director coordinates procedures established by the ODOD and SDE/DVE. These state agencies sponsor monthly meetings for the Directors to share current developments and local operational problems. All projects are ultimately approved for local implementation by both state agencies.

Consortium offices are generally housed either in an educational facility or in a Chamber of Commerce (or other related type organization) office.

Each Consortium establishes its own membership beyond the local educational institutions. Membership among the 23 Consortia varies from 3 to 35. The difference in number relates primarily to the number of schools in the area and the number of representatives from the Chamber of Commerce and business and industry.

Persons interested in an indepth analysis of the operational policies may obtain, on loan, copies of the completed study, which exceeded 150 pages, from the Ohio Advisory Council for Vocational Education.

Consortia have direct links with the business community through a Chamber of Commerce and/or a local economic development related organization (e.g. a public utility, or a municipal office). All Consortia have representation from the local secondary and two year post-secondary institutions that lie within their service area.

Marketing Techniques

A variety of public relations methods have been used by the Consortia. The members and directors indicated that personal contact by the CD was the most effective communication technique with business and industry personnel. Other techniques that were highly ranked included brochures, Chamber publications, presentations, telephone, news media, and mailings. Contact persons in industry were frequently identified by the Directors through Chamber of Commerce sources.

Directors reported that many companies are at first skeptical that funding and other resources are actually available for their use. Through personal contact, this general lack of knowledge about vocational-technical services and state funding resources is overcome and cooperative relationships are established.

As the Consortium Director expands contacts in the Community and as the local Consortium receives publicity and through implementation of projects, more contracts will be generated through the community either directly or by referral. Referral contracts are generated as the credibility of the Consortium and its Director is established.

Most communities have a variety of groups engaged in economic development activities. The CD must seek out these individuals and groups and develop a working relationship with them. Directors reported a variety of situations where they were called in to work with a company on the basis of a referral by a local economic development group.

The challenge of informing a variety of groups and individuals about the Consortia will never end. Both internal (Consortia members) and external groups will need to be continually up-dated about new and developing Consortia projects.

Developing a Training Proposal

Business/Industry Eligibility Criteria

The following criteria are used to qualify for special project funds through ODOD:

- An expansion of the work force must be documented by the company for which a proposal is being submitted, indicating that at least ten permanent full-time equivalent jobs will be created.
- ODOD funds supplement Vocational Education allocations for instructional hour reimbursements and, in addition, may provide support for such training related costs as the purchase of training equipment, instructional supplies, development of audio-visual aids, and up to 50% of the cost of special training program consultants.
- Priority status is given to funding projects for industrial manufacturing and assembly operations.
- Final authority for project approval rests with the respective state Department Directors (DVE and ODOD).

Types of Training Services

The Consortium Director (CD) must be aware of the various training services that can be provided by each of the educational institutions within the Consortium, and the resources available through the state agencies. The ability to convert and/or coordinate these resources to meet the training needs of various types of business/industry situations is essential.

The following specific forms of training assistance may be provided (excerpted from a paper supplied by the Toledo-Northwest Ohio Consortium Director titled, "Ohio's Industrial Training Programs"):

Specific Training Assistance

1. Training Coordination
2. Manufacturing Process and Plant Engineering Review
3. Supervisory Training (Management Development)

4. Industrial Process Review
5. Training of Present Employees (Hourly and Semi-Skilled)
6. Orientation and Training of New Employees
7. Skill Training (Including Apprenticeship)
8. Instructor Training
9. Assessment Programs

Educational Support Services

1. Software Training Assistance, including audio-visual aids and instructional materials.
2. Facilities and Equipment: Classroom space and equipment may be furnished in vocational or technical schools, or within the plant.
3. Contractual Training for specialized needs may be subsidized at 50% by the state agencies.

Preparing a Training Proposal

A number of important steps must be completed in the process of preparing an acceptable proposal document for submission to the SDE and the ODOD. There is no required standard operating procedure or established project format demanded by either state agency. The following steps in preparing a proposal have been identified:

Step 1 - Conduct a Needs Assessment

Refer to the type of training available and identify the needs in terms of number to be served, how, and time required.

Step 2 - Identify Needed Training Services

These services can be categorized as listed in Educational Support Services.

Step 3 - Select the Training Provider(s)

The Director has the responsibility to solicit proposals to provide the requested training from the Consortium members. In some situations,

only one institution may be contacted because of its special expertise, facilities, its proximity to the company, or because the company prefers to work with a specific school.

Frequently, however, the Consortium Director may ask all member institutions to respond to a Request for Proposal (RFP) which provides a cost estimate for each training component. The company reviews the proposals and determines which group or groups can best provide the training.

Step 4 - Establish an Implementation Timeline

The basic functions of this activity result in a compilation defining the following data:

1. Tasks to be accomplished to meet the various training objectives or goals.
2. Identification of persons and departments responsible for completing the various tasks.
3. Establishment of completion date goals for the various tasks by the departments and persons involved.

Step 5 - Develop a Proposed Budget

Working together, the Consortium Director, the company, and the training provider(s) have the responsibility to develop cost estimates for each of the following major expense categories for each type of training to be offered: Direct instructional costs (hourly), Training Coordinators, and the educational support services indicated earlier.

The Consortium Director will frequently do most of the legwork for this step--gathering data from the schools, the State Department, the company, outside vendors, and other Consortia, to arrive at final cost estimates.

Costs are controlled in some cases by the SDE or ODOD. For example, a fixed dollar figure per instructional hour has been established to reimburse trainer costs. Costs over this amount are the responsibility

of the company. Also, some costs are not currently approvable, e.g., trainee stipends, costs of equipment used to produce products for commerce, and costs of project administration incurred by the fiscal agent.

Step 6 - Identify the Fiscal Agent

One of the local educational institutions should be identified as fiscal agent for the project. Duties would include: providing appropriate accounting services, writing purchase orders, disbursing project funds, submitting appropriate fiscal reports to SDE/ODOD, coordinating SDE opening and closing reports for classes conducted in-house by the company, approving contracts with outside consultants and vendors, and in general maintaining accurate and up-to-date budget account balances and providing other accounting services as needed.

Step 7 - Submit Proposal to SDE/ODOD

The Consortium Director, working closely with the company and training provider(s), is responsible for compiling the final project for submission to the SDE and ODOD for funding consideration. The final document generally contains the following major components:

1. Project Rationale (new or expanding company, reason for training, company investment, number of new employees, et cetera.)
2. Instructional Needs (including projected costs per item)
   Specific Training Needs
   Educational Support Services
3. Project Coordination (depending on size of program)
4. Budget Summary

There are presently no standards or criteria in place that require any evaluation or cost-benefit analysis procedures to be included in the project proposal.

Project Approval and Implementation

Securing Project Approval

After a project proposal is submitted to the State Department of Education, the Consortium Director generally continues to monitor its

progress. The Director of Business and Industry Communication in the Department of Vocational Education (DVE) reviews the project prior to submitting it to the Ohio Department of Development.

Upon submission of the proposal to the ODOD, the following points are examined:

- Does the business qualify for assistance (is it a new or expanding organization and does it meet the minimum number of persons to be trained)?
- Are the specific items requested for funding approvable?
- Are the requested expenditures relevant to the goals of the project?
- Are the projected costs reasonable and within stated reimbursement rates, if any?
- What is the timeline for the project, including specific beginning and ending dates?
- What is the dollar amount of the company's investment in the project?

The total review process is designed to be completed within three to five weeks. However, most Consortium Directors monitor the movement of the project through the system to ensure that no undue delays occur because of a lack of information or clarity regarding any item contained in any of the project's component sections.

Implementation

When project approval is secured, the Consortium Director must immediately set up proper procedures and budgets with the previously identified fiscal agent. A clear line of authority over the project budget should be established initially. The fiscal agent must operate the project according to established state approved accounting procedures. Authority for approving expenditures related to the project should fall to the Consortium Director.

A close working relationship with the fiscal agent's staff should be developed to insure a smooth flow of project funds. It is the role of the Consortium Director to monitor all fiscal affairs relating to the project, including the process for reporting training class data. This facet of reporting generally is delegated to the adult or continuing education supervisor.

Evaluation and Recommendations

This chapter includes a summary of approved projects, conclusions of evaluation ratings by Consortia Directors and members and recommendations.

Summary of Approved Projects

Through early March of 1982, a total of sixty-five projects involving sixty different companies had been approved by SDE/ODOD. With an investment of over $1,240,000 by the SDE Division of Vocational Education, and over $3,359,000 by the ODOD, 54,140 jobs were impacted by the projects. The average cost for each job affected is approximately $85 of SDE/ODOD funds. In addition, four on-site coordinators have been hired to supervise large projects approved for major industries.

Projects vary in size and complexity from a single training class for as few as three trainees at a cost of $660 to the $581,000 project for the GM Chevrolet Moraine project that is scheduled to train 6,000 manufacturing employees. The large project in terms of total number of employees directly affected is the GM Lordstown effort designed to train over 10,000 employees. The Rockwell project in Columbus is projected eventually to involve over 7,500 new workers.

Examples of other projects are shown in Table 3.

TABLE 3

Examples of Approved Training Projects in Ohio, 1981-82

Location	Company	Costs			Job Impact No. of Workers
		Total	Voc. Ed.	ODOD	
Toledo	AMC Jeep	$580,000	$96,011	$343,247	4,200
Wooster	Am. Augers	24,882	12,441	12,441	54
Lancaster	Arvin/Diamond Elec.	4,034*		1,000	60
Hudson	Chem. Assoc.	232	232	--	3
Columbus	Columbus Auto Parts	7,226	363	2,000	820
Cincinnati	Cont. Dutch Cocoa	10,000	2,500	2,500	11
Upper Sandusky	Cont. Hy-draulic Hose*	83,382	12,441	38,211	77
Marion	Eaton*	86,488	2,244	2,744	30
Akron	Goodyear Aerospace	13,706	1,716	12,056	
	Jeno's*	270,750	16,596	125,625	1,200
Chillicothe	Mead Paper	82,394	18,029	64,365	300
Youngstown	Packard Electric*	224,263	23,540	62,330	1,800
Portsmouth	Shawnee Shoes	1,320	660	660	6
Waverly	Wolverine Aluminum	11,440	11,440	--	30
Wapakoneta	M-S Enterprises	3,301	1,200	1,190	30

*Total project cost includes the company contribution

Source: State Department of Education, March 9, 1982

Conclusions of Evaluation Ratings

The following conclusions of evaluation ratings by Consortium Directors and members imply that a solid base of support exists for continued development of the Consortia:

1. The Consortium can play a strong role in the assessment of regional training needs.

2. The Consortium can effectively assist with the development of entrepreneurship programs in the community.

3. The Consortium will have a positive impact upon the community's ability to retain existing business and industry.

4. Secondary and post-secondary educational institutions can work together to better serve business and industry.

5. Effectiveness of the Consortium could be most improved by greater funding and more contacts with business and industry.

6. Overall effectiveness of the Consortium to date and its potential for participating in local economic development activities is good or excellent.

From the research in this study, it appears that Ohio's system of Vocational-Technical Resource Consortia is an excellent method for coordinating resources to help solve training problems. The Consortia are being directly involved in local economic development activities and are effectively assisting in efforts to attract new companies to the state and to retain existing ones. The coordination of Consortia efforts with local and state agencies and organizations, in addition to business and industry, is essential for the success of the program.

Recommendations

The recommendations are based upon conclusions drawn from the study.

Organization and Administration

1. The State Government should:
   a. continue to provide special funds for training programs for business and industry through the Consortia program;
   b. expand the criteria for approvable projects to include training essential for the retention of business/industry in the state in addition to new and expanding industry;
   c. establish a permanent funding base to support the management costs of the local Consortia.

2. The Consortium Director should:
   a. be selected on the basis of having the essential skills to provide the leadership and management of the basic administrative functions of planning, organizing, directing and communicating involved with a wide variety of institutions, businesses/industries, organizations and individuals;
   b. carefully articulate activities with local adult/continuing education staffs in member institutions to avoid duplication of effort,
   c. be regularly evaluated by the Consortium Board.

3. A greater commitment to economic development activities and the unique training needs that tie in with these efforts should be made by the Boards, top administrators and faculties of the local educational institutions.

4. The Consortium membership should represent all local educational institutions and related economic development agencies and organizations, including Chambers of Commerce which help to provide credibility in the business community and entre to top level business contacts.

5. Direct involvement of more business/industry representatives on Consortia Boards should be considered as a means for developing a broader base of support in the local community.

6. The regional organization of the twenty-three Consortia should be evaluated regularly for efficiency and effectiveness of operation.

7. Consistent operational policies and guidelines should be developed at the state and local levels in an effort to reduce/eliminate dual standards and/or interpretations.

8. A closer relationship between state level vocational and post-secondary administrators should be encouraged, supported and coordinated.

Marketing and Communication Strategies

1. The temptation to oversell the ability of the Consortium to solve all the training needs of business/industry should be carefully monitored at all levels.

2. The Consortium Director should:
   a. further develop communications networks between Consortium members and decision makers in business and industry.
   b. develop and maintain regular channels of communication with institutional member boards and Chief Executive Officers.
   c. continue to meet personally with business/industry leaders to inform them about their Consortium's training resources.
   d. extend efforts to regularly inform and meet with all local agencies and organizations involved with economic development activities.

3. Greater involvement and improved communication with the state ODOD economic development team should be encouraged.

4. Each Consortium should continue to utilize all available media to publicize its efforts, programs and available resources.

5. Individual schools should be prepared to develop training packages and market them to a particular company, sometimes in direct competition with commercial vendors.

Training Proposal Development

1. Consortium Directors should continue to develop skills in business/industry training needs assessment techniques to be able to make appropriate recommendations for training programs.

2. Educational institutions should develop the ability to be flexible enough and creative enough to provide the skills, managerial responsiveness and resources necessary to provide on-site, industry or job-specific training activities of relatively short duration at times and places chosen by the employer.

3. There should be a minimum amount of red tape and time involved in acquiring project approval.

4. Project proposals should have a clearly defined timeline of activities that identifies the goals of the projects, tasks to be completed, responsible persons or groups and completion date targets.

5. For efficient and effective project implementation and management to be attained, proposals and agreements should spell out the training needs and resources required as completely as possible.

6. A central source of expertise should be considered to act in a consultant capacity for needs assessment purposes and for the development of training packages in new and/or emerging technologies or managerial techniques, e.g., robotics, fiber optics, programmable controllers, computer aided design/manufacturing systems, employee participation models, and job redesign systems.

7. The role of state consultants in the development of local projects should be carefully managed so they do not down-play the expertise of local educators and Consortium Directors.

Training Proposal Approval and Management

1. The roles, responsibilities and authority of the state Division of Vocational Education and Ohio Department of Development, local educational institution administrators, and Consortium Directors should be more clearly delineated in all aspects of Consortium and project administration.

2. A complete system of project monitoring and evaluation standards should be developed and documented to include analyses of cost-benefit ratios, productivity improvement, worker satisfaction, total number of jobs actually retained or created and evaluation and documentation of actual training classes/sessions.

3. Educational agencies (state and local) should consider further development of their policies, procedures and capabilities to be able to more effectively implement on-site training programs.

4. Authority and responsibility for approving project expenditures should be clearly defined with the fiscal agent at the start of each project by the state funding agencies.

5. Fiscal agents should be as flexible as possible in handling project finances.

6. Incentives for fiscal agent participation should be identified to help defray reasonable administrative and clerical costs. (E.g., First option to buy training equipment at the conclusion of a project, authority to invest project funds and use earned interest to cover overhead costs, opportunity to include staff in training opportunities included in the project, include a flat rate as direct factor in the project budget to cover overhead costs and develop an overhead cost reimbursement rate based on number of instructional hours provided.)

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Ohio Vocational-Technical Consortium Districts